3. Food Instrument Disposition

This functionality of the WIC System allows the user to review the current status of all food instruments that have been processed by the system.

3.1 Food Instrument Search

The Food Instrument Search dialog allows the user to search for food instruments that fit the selected search criteria. It is invoked in response to the following user actions:

- Selection of the Food Instrument Disposition menu item from the Activities menu defined in *Chapter 06 – Search-Selection*

- Selection of the Search button on the Food Instrument Disposition defined in this document.
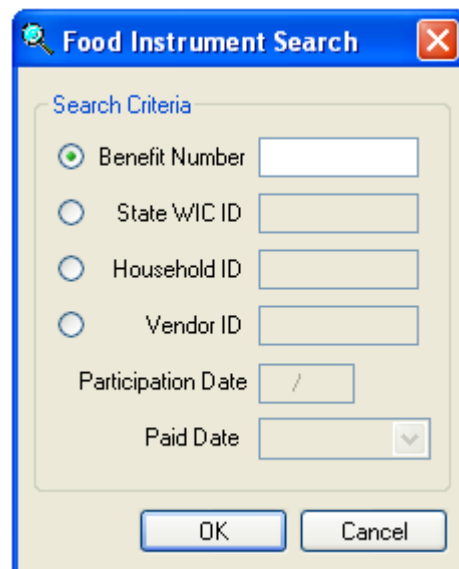

Figure 1 – Food Instrument Search Dialog

3.1.1 Controls

This section describes the behavior of the controls on the Food Instrument Search dialog.

3.1.1.1 Search Criteria Radio Button Group

The control allows the user to indicate which data elements the system will check when searching for a food instrument. The radio button group consists of the following buttons:

- Benefit Number

- State WIC ID

- Household ID

- Vendor ID/Participation Date/Paid Date

The Benefit Number radio button will be initially selected.

Selection of the Benefit Number radio button will enable the Benefit Number masked edit box and disable the following controls:

- State WIC ID masked edit box

- Household ID masked edit box

- Vendor ID masked edit box

- Participation Date masked edit box

- Paid Date masked edit box

Selection of the State WIC ID radio button will enable the State WIC ID masked edit box and disable the following controls:

- Benefit Number masked edit box

- Household ID masked edit box

- Vendor ID masked edit box

- Participation Date masked edit box

- Paid Date masked edit box

Selection of the Household ID radio button will enable the Household ID masked edit box and disable the following controls:

- Benefit Number masked edit box

- State WIC ID masked edit box

- Vendor ID masked edit box

- Participation Date masked edit box

- Paid Date masked edit box

Selection of the Vendor ID/Participation Date combination radio button will enable the following controls:

- Vendor ID masked edit box

- Participation Date masked edit box

- Paid Date masked edit box

And will disable the following controls:

- Benefit Number masked edit box

- State WIC ID masked edit box

- Household ID masked edit box

3.1.1.2 Benefit Number Masked Edit Box

The control allows the user to enter the Benefit Number as part of the search criteria. It is enabled when the dialog is active and the Benefit Number radio button is selected. It allows the entry of numeric characters. The mask for the box is "########". The control is initially blank.

If fewer than the maximum number of digits are entered into the masked edit box, it will be padded on the left with zeros.

3.1.1.3 State WIC ID Masked Edit Box

The control allows the user to enter the State WIC ID as part of the search criteria. It is enabled when the dialog is active and the State WIC ID radio button is selected. It allows the entry of alphabetic and numeric characters. The mask for the box is "########". The control is initially blank.

If fewer than the maximum number of characters are entered into the masked edit box, it will be padded on the left with zeros.

3.1.1.4 Household ID Masked Edit Box

The control allows the user to enter the Household ID as part of the search criteria. It is enabled when the dialog is active and the Household ID radio button is selected. It allows the entry of alphabetic and numeric characters. The mask for the box is "########". The control is initially blank.

If fewer than the maximum number of characters are entered into the masked edit box, it will be padded on the left with zeros.

3.1.1.5 Vendor ID Masked Edit Box

The control allows the user to enter the Vendor ID as part of the search criteria. It is enabled when the dialog is active and the Vendor ID/Participation Date/Paid Date radio button is selected.

The character type and length for the edit box will vary according to your state. The control is initially blank.

The maximum allowed for entry is dependent upon the VendorIDLength business rule set for your state.

The character type allows alphabetic characters and digits. Alpha characters are forced to uppercase. Special characters are not accepted. The control will only allow entry of numeric characters if the VendorID_Numeric business rule is set for your state and the mask will be "######".

If the VendorNumeric business rule is set for your state and if less than the maximum number of digits are entered into the masked edit box, it will be padded on the left with zeros based upon the VendorNumeric business rule set for your state.

3.1.1.6 Participation Date Masked Edit Box

The control allows the user to enter the Participation Date as part of the search criteria. It is enabled when the dialog is active and the Vendor ID/Participation Date/Paid Date radio button is selected. It allows the entry of numeric characters. The mask for the box is "##/####" to accept a month and a four digit year. The control is initially blank.

3.1.1.7 Paid Date Calendar Date Control

The control allows the user to enter the Paid Date as part of the search criteria. It is enabled when the dialog is active and the Vendor ID/Participation Date/Paid Date radio button is selected. The control is initially blank.

3.1.1.8 OK Button

The control allows the user to exit the Food Instrument Search dialog and begin the search for food instruments. It is enabled when the dialog is active. It will not have a mnemonic. Characteristics for the OK button are defined in *Consistencies*.

3.1.1.9 Cancel Button

The control will allow the user to exit the Food Instrument Search dialog and return to the calling dialog. It is enabled when the dialog is active. It will not have a mnemonic. Characteristics for the Cancel button are defined in *Consistencies*.

3.1.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Food Instrument Search dialog.

3.1.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to "Food Instrument Search"
- All controls are initially blank.

3.1.2.2 Edits

Upon selection of the OK button, the system will check that a selection is made in the following controls:

- Search Criteria radio button group

If an entry is not made in the above-listed control, the system will invoke a standard error message with the text "A selection is required in the Search Criteria."

If an invalid date is entered in a date control, the system will invoke a standard error message with the text "Invalid date entered."

If a date is entered in the Paid Date masked edit box, it must be equal to or less than the current system date. If the entry is greater than the system date the system will invoked a standard error message with the text "Date entered must be less than or equal to today's date."

When the Benefit Number radio button is selected, an entry is required in the following control:

- Benefit Number masked edit box

If an entry is not made in the above-listed control, the system will invoke a standard error message with the text "An entry is required for the Benefit Number."

When the State WIC ID radio button is selected, an entry is required in the following control:

- State WIC ID masked edit box

If an entry is not made in the above-listed control, the system will invoke a standard error message with the text "An entry is required for the State WIC ID."

When the Household ID radio button is selected, an entry is required in the following control:

- Household ID masked edit box

If an entry is not made in the above-listed control, the system will invoke a standard error message with the text "An entry is required for the Household ID."

When the Vendor ID/Participation Date/Paid Date combination radio button is selected, an entry is required in the following control:

- Vendor ID masked edit box

If an entry is not made in the above-listed control, the system will invoke a standard error message with the text "An entry is required for the Vendor ID."

When the Vendor ID/Participation Date/Paid Date combination radio button is selected, an entry is also required in one of the following controls:

- Participation Date masked edit box
- Paid Date masked edit box

If an entry is not made in one of the above-listed controls, the system will invoke a standard error message with the text "An entry is required for the Participation Date or Paid Date."

3.1.2.3 Search for Food Instruments Meeting Criteria

Upon successful completion of the above-listed edits, the system will search for food instruments that meet the criteria entered into the Search Criteria controls for the selected Clinic only.

The system will provide a hard search for the controls. A hard search will search for exact matches to the values entered.

When matching food instruments are found, the system will exit the Food Instrument Search dialog and return to the Food Instrument Disposition dialog as defined in this document.

If no records are found that meet the Search Criteria on the Food Instrument Search dialog, the system will invoke a standard information message with the text "No food instruments matching your search criteria could be found. Please try again, with different search criteria." The system will then return to the Food Instrument Search dialog.

3.2 Food Instrument Disposition

This dialog allows the user to view the list of food instruments that matched the search criteria as entered on the Food Instrument Search dialog. It is invoked when the user selects the OK button from the Food Instrument Search dialog.

The food instrument list is populated based upon the search criteria selected on the Food Instrument Search dialog:

- The list will contain the food instrument with a specific Benefit Number when the Benefit Number was entered as the search criteria (Benefit Number view)

- The list will contain all food instruments issued for a specific participant when their State WIC ID was entered as the search criteria (State WIC ID view)

- The list will contain all food instruments issued for the members of a household when their Household ID was entered as the search criteria (Household ID view)

- The list will contain all food instruments that were redeemed at a specific Vendor, and were either issued for a specific participation month or were redeemed on a specific date, when a combination of Vendor ID and Participation Date/Paid Date was entered as the search criteria (Vendor ID/Participation Date/Paid Date view)
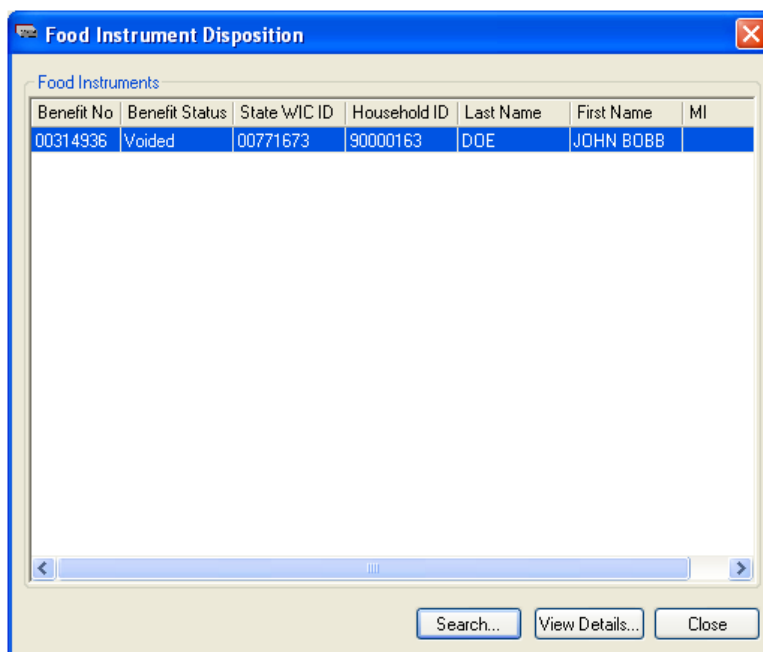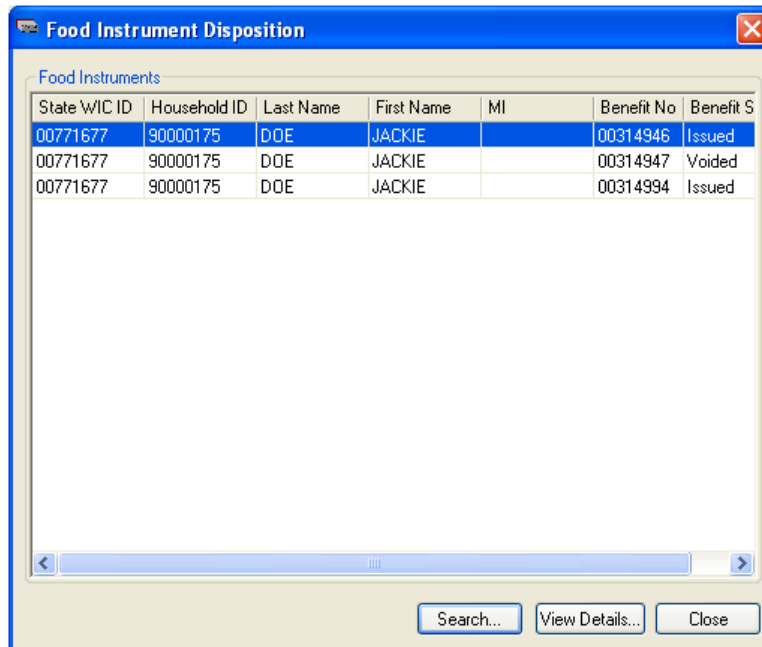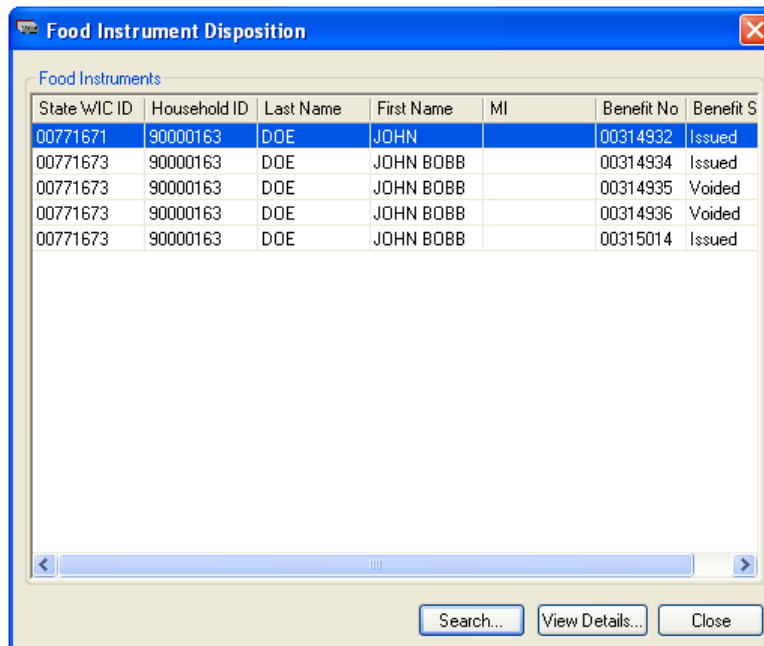

Figure 2 - Food Instrument Disposition Dialog – Benefit Number View

Figure 3 - Food Instrument Disposition Dialog – State WIC ID Number View

Figure 4 - Food Instrument Disposition Dialog – Household ID View

Figure 5 - Food Instrument Disposition Dialog – Vendor ID/Participation Date/Paid Date View

3.2.1 Controls

This section describes the behavior of the controls on the Food Instrument Disposition dialog.

3.2.1.1 Food Instrument List Data Grid (All Views)

The control allows the user to select the appropriate food instrument to view. The data grid contains columns that vary depending on the current view of the food instrument list.

In the **Benefit Number** view, the food instrument list contains the following columns:

- Benefit Number (Benefit No)

- Benefit Status

- State WIC ID

- Household ID

- Last Name

- First Name

- Middle Initial (MI)

In the **State WIC ID** and **Household ID** views, the food instrument list contains the following columns:

- State WIC ID

- Household ID

- Last Name

- First Name

- Middle Initial (MI)

- Benefit Number (Benefit No)

- Benefit Status

In the **Vendor ID/Participation Date/Paid Date** view, the food instrument list contains the following columns:

- Vendor ID

- Vendor Name

- Benefit Number (Benefit No)

- Benefit Status

The sort order of the food instrument list will vary depending on the current view of the list as follows:

- In the Benefit Number view, the participant list will be sorted by ascending Benefit Number. The first entry will initially be selected.

- In the State WIC ID view, the food instrument list will be sorted by State WIC ID and ascending Benefit Number. The first entry will initially be selected.

- In the Household ID view, the food instrument list will be sorted by Household ID, State WIC ID, and ascending Benefit Number. The first entry will initially be selected.

- In the Vendor ID/Participation Date/Paid Date view, the food instrument list will be sorted by Vendor ID and ascending Benefit Number. The first entry will initially be selected.

The data in the grid is read-only.

3.2.1.2 Search Button

The control allows the user to invoke the Food Instrument Search function. It is enabled when the dialog is active. It has a mnemonic of "S".

3.2.1.3 View Detail Button

The control allows the user to view the details of the selected food instrument. It is enabled when the dialog is active. It has a mnemonic of "V".

3.2.1.4 Close Button

The control allows the user to exit the Food Instrument Disposition dialog and return to the main State Office application dialog. It is enabled when the dialog is active. Characteristics for the Close button are defined in *Consistencies*.

3.2.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Food Instrument Disposition dialog.

3.2.2.1 Initializing the Interface

Upon initial presentation of the dialog, the title bar text will be set to "Food Instrument Disposition"

The Food Instruments grid will display results from the Food Instrument Search defined above in this document.

3.2.2.2 Edits

All controls on the Food Instrument Disposition dialog are read-only; therefore, there are no edits performed.

3.2.2.3 Search for Food Instruments

Upon selection of the Search button, the system will invoke the Food Instrument Search dialog defined in this document.

3.2.2.4 View Detail

Upon selection of the View Detail button, the system will invoke the Food Instrument Detail dialog defined in this document.

3.3 Food Instrument Detail

This dialog allows the user to view the detail information about a food instrument. It is invoked when the user selects the View Detail button on the Food Instrument Disposition dialog as defined in this document.

Figure 6 – Food Instrument Detail Dialog

3.3.1 Controls

This section describes the behavior of the controls on the Food Instrument Detail dialog.

3.3.1.1 Benefit Number Text and Value Label

The control allows the user to view the Benefit Number of the food instrument. The value label is populated with the value of the Serial-No column of the FOOD-INSTRUMENT table. The value displays in the inverse color of the form.

3.3.1.2 FI Type Text and Value Label

The control allows the user to view the food instrument type of the food instrument. The value label is populated with the value of the Food-Instrument-Type column of the FOOD-INSTRUMENT table. The value displays in the inverse color of the form. If the information is not currently available, the value label is blank.

3.3.1.3 Clinic Text and Value Labels

These controls allow the user to view the clinic where the food instrument was issued. The value labels will be filled with the value of the Service-Site-ID columns of the FOOD-INSTRUMENT-SET table. The value displays in the inverse color of the form. If the information is not currently available, the value label is blank.

3.3.1.4 Status Text and Value Label

The control allows the user to view the current status of the food instrument. The value label is populated with one of the following values that represent the current status of the food instrument:

- REDEEMED
- PARTIAL REDEEMED
- VOIDED
- STOLEN
- EXPIRED
- ISSUED

The value displays in the inverse color of the form.

3.3.1.5 Mailed Benefit Text and Value Label

The control displays an indicator of whether or not the benefit was mailed to the participant. The value label will display either 'Yes' or 'No'. The value displays in the inverse color of the form.

3.3.1.6 Issued Date Text and Value Label

The control allows the user to view the issued date of the food instrument. The value label is populated with the value of the Issued-Date column of the FOOD-INSTRUMENT-SET table. The value displays in the inverse color of the form. If the information is not currently available, the value label is blank.

3.3.1.7 Participation Date Text and Value Label

The control allows the user to view the participation date of the food instrument. The value label is populated with the value of the Participation-Date column of the FOOD-INSTRUMENT-SET table. The value displays in the inverse color of the form. If the information is not currently available, the value label is blank.

3.3.1.8 Expiration Date Text and Value Label

The control allows the user to view the expiration date of the food instrument. The value label is populated with the value of the Expiration-Date column of the FOOD-INSTRUMENT table. The value displays in the inverse color of the form. If the information does not apply to the current status of the food instrument, the value "N/A" will be displayed.

3.3.1.9 First Date to Use Text and Value Label

The control allows the user to view the first date to use of the food instrument. The value label is populated with the value of the First-Use-Date column of the FOOD-INSTRUMENT-SET table. The value displays in the inverse color of the form. If the information is not currently available, the value label is blank.

3.3.1.10 Last Date to Use Text and Value Label

The control allows the user to view the last date to use of the food instrument. The value label is populated with the value of the Last-Use-Date column of the FOOD-INSTRUMENT-SET table. The value displays in the inverse color of the form. If the information is not currently available, the value label is blank.

3.3.1.11 Paid Date Text and Value Label

The control allows the user to view the paid date of the food instrument. The value label is populated with the value of the Paid-Date column of the FOOD-INSTRUMENT table. The value displays in the inverse color of the form. If the information does not apply to the current status of the food instrument, the value "N/A" will be displayed.

3.3.1.12 Paid Amount Text and Value Label

The control allows the user to view the paid amount of the food instrument. The value label is populated with the value of the Paid-Amt column of the FOOD-INSTRUMENT table. The value displays in the inverse color of the form. If the information applies to the current status of the food instrument, the value displays in the "$#####.##" format. If the information does not apply to the current status of the food instrument, the value "N/A" will be displayed.

3.3.1.13 Void Date Text and Value Label

The control allows the user to view the date that the food instrument was voided. The value label is populated with the value of the Voided-Date column of the FOOD-INSTRUMENT table. The value displays in the inverse color of the form. If the information does not apply to the current status of the food instrument, the value "N/A" will be displayed.

3.3.1.14 Void Reason Text and Value Label

The control allows the user to view the reason that the food instrument was voided. The value is populated from the appropriate value in the reference dictionary table of the lookup database for the Void-Reason column of the FOOD-INSTRUMENT table. The value displays in the inverse color of the form. If the information does not apply to the current status of the food instrument, the value "N/A" will be displayed.

3.3.1.15 Reported Stolen Date Text and Value Label

The control allows the user to view the date that the food instrument was reported as stolen. The value label is populated with the value of the Reported-Stolen-Date column of the FOOD-INSTRUMENT table. The value displays in the inverse color of the form. If the information does not apply to the current status of the food instrument, the value "N/A" will be displayed.

3.3.1.16 State WIC ID Text and Value Label

The control allows the user to view the State WIC ID of the participant who was issued the food instrument. The value label is populated with the value of the State-WIC-ID column of the FOOD-INSTRUMENT-SET table. The value displays in the inverse color of the form. If the information is not currently available, the value label is blank.

3.3.1.17 Household ID Text and Value Label

The control allows the user to view the Household ID of the participant who was issued the food instrument. The value label is populated with the value of the Household-ID column of the MEMBER table. The value displays in the inverse color of the form. If the information is not currently available, the value label is blank.

3.3.1.18 Name Text and Value Label

The control allows the user to view the name of the participant who was issued the food instrument. The value label is populated with the value of the Last-Name, First-Name and Middle-Initial columns of the MEMBER table. The value displays in the inverse color of the form. If the information is not currently available, the value label is blank.

The value displays in {last name}, {first name} {middle initial} format.

3.3.1.19 WIC Category Text and Value Label

The control allows the user to view the WIC Category of the participant who was issued the food instrument. The value is populated from the appropriate value in the reference dictionary table of the lookup database for the WIC-Status column of the MEMBER table. The value displays in the inverse color of the form. If the information is not currently available, the value label is blank.

3.3.1.20 Priority Text and Value Label

The control allows the user to view the priority assigned to the participant who was issued the food instrument. The value label is populated with the value of the Priority column of the FOOD-INSTRUMENT-SET table. The value displays in the inverse color of the form. If the information is not currently available, the value label is blank.

3.3.1.21 Vendor ID Text and Value Label

The control allows the user to view the Vendor ID of the vendor where the food instrument was redeemed. The value label is populated with the value of the Vendor-ID column of the FOOD-INSTRUMENT table. The value displays in the inverse color of the form. If the information is not currently available, the value label is blank.

3.3.1.22 Stamp Number Text and Value Label

The control allows the user to view the stamp number of the vendor where the food instrument was redeemed. The value label is populated with the value of the Stamp-Number column of the FOOD-INSTRUMENT table. The value displays in the inverse color of the form. If the information is not currently available, the value label is blank.

3.3.1.23 Peer Group Text and Value Label

The control allows the user to view the peer group of the vendor where the food instrument was redeemed. The value label is populated with the value of the Peer-Group column of the FOOD-INSTRUMENT table. The value displays in the inverse color of the form. If the information is not currently available, the value label is blank.

3.3.1.24 Vendor Name Text and Value Label

The control allows the user to view the name of the vendor where the food instrument was redeemed. The value label is populated with the value of the Trade-Name column of the VENDOR table. The value displays in the inverse color of the form. If the information is not currently available, the value label is blank.

3.3.1.25 Average Price Text and Value Label

The control allows the user to view the vendor peer group average price for the food instrument type of the food instrument at the time it was redeemed. The value label is populated with the value of the Avg-Price column of the PEER-GROUP-FOOD-INST-TYPE-PRICE table. The value displays in the inverse color of the form. If the information is available, the value displays in the "$#####.##" format. If the information is not currently available, the value label is blank.

3.3.1.26 Percent Over Text and Value Label

The control allows the user to view the vendor peer group percent over value. The value label is populated with the value of the Percent-Over column of the PEER-GROUP table. It will be displayed as a percent greater or less than 100%. The value displays in the inverse color of the form. If the information is not currently available, the value label is blank. If the information is available, the value displays in the "###%" format.

3.3.1.27 Maximum Price Text and Value Label

The control allows the user to view the vendor peer group maximum price for the food instrument type of the food instrument at the time it was redeemed. The value label is populated with the total value of the Max-Price column on the PEER-GROUP-FOOD-ITEM-HISTORY table for all of the food items (records in the FOOD-ITEM-ON-CHECK table) on the food instrument. The system will compare the value of the Paid-Date column of the FOOD-INSTRUMENT table to the Changed-DT-Time column on the PEER-GROUP-FOOD-ITEM-HISTORY table to determine which record contains the Max-Price at the time the food instrument was redeemed. The value label will display in the inverse color of the dialog. If the information is available, the value displays in the "$#####.##" format. If the information is not currently available, the value label is blank.

3.3.1.28 Reject Information Button

The control allows the user to view the reason(s) that the selected food instrument was rejected. It is enabled when the dialog is active and if the Rejected column of the FoodInstrument table = "Y" for the selected Food Instrument. It has a mnemonic of "R".

3.3.1.29 Food Items Button

The control allows the user to view the food items that printed on the selected food instrument. It is enabled when the dialog is active and the food instrument contains food items on the FOOD-ITEM-ON-CHECK table. It has a mnemonic of "F".

3.3.1.30 Close Button

The control will allow the user to exit the Food Instrument Detail dialog and return to the Food Instrument Disposition dialog. It is enabled when the dialog is active. It has no mnemonic. Characteristic for the Close button are defined in *Consistencies*.

3.3.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Food Instrument Detail dialog.

3.3.2.1 Initializing the Interface

Upon initial presentation of the dialog, the title bar text will be set to "Food Instrument Detail"

The detail of the selected food instrument is displayed as defined for each field in the Controls section above.

3.3.2.2 Edit for Required Entry in Controls

All controls on the Food Instrument Detail dialog are read-only; therefore, there are no edits performed.

3.3.2.3 Reject Information

Upon selection of the Reject Information button, the system will invoke the Food Instrument Reject Information dialog defined in this document.

3.3.2.4 Food Items

Upon selection of the Food Items button, the system will invoke the Food Instrument Items dialog defined in this document.

3.4 Food Instrument Reject Information

This dialog allows the user to view the reject information for a food instrument. It is invoked when the user selects the Reject Information button from the Food Instrument Detail dialog as defined in this document.

Figure 7 – Food Instrument Reject Information Dialog

3.4.1 Controls

This section describes the behavior of the controls on the Food Instrument Reject Information dialog.

3.4.1.1 Benefit Number Text and Value Label

The control allows the user to view the Benefit Number of the food instrument. The value label is populated with the value of the Serial-No column of the FOOD-INSTRUMENT table. The value displays in the inverse color of the form.

3.4.1.2 Reject Reasons Data Grid

The control allows the user to view the reasons that the food instrument was ever rejected by the WIC bank. The data grid contains the following columns:

- Reject Date
- Reject Reason

The grid will contain an entry for each reject reason that was recorded for the food instrument. The entries will be sorted in descending order according to the value of the Reject Date and Reject Reason fields. The data in the grid is read-only.

If the food instrument was ever rejected by the bank (even if it is eventually paid) and has the associated rejected reason information in the FoodInstrumentRejection table it will be displayed in this grid.

3.4.1.3 Close Button

The control will allow the user to exit the Food Instrument Reject Information dialog and return to the Food Instrument Detail dialog. It is enabled when the dialog is active. It has no mnemonic. Characteristics for the Close button are defined in *Consistencies*.

3.4.2 Processes

3.4.2.1 Initializing the Interface

Upon initial presentation of the dialog, the title bar text will be set to "Food Instrument Reject Information"

The Benefit Number value label will display the currently selected Benefit Number

The Reject Reasons data grid will contain an entry for each reject reason that was recorded for the food instrument.

3.4.2.2 Edits

There are no updateable controls on this dialog, therefore no edits are defined.

3.4.2.3 Saving the Data

There are no updateable controls on this dialog, therefore no data is saved.

3.5 Food Instrument Items

This dialog allows the user to view the food items that printed on a food instrument. It is invoked when the user selects the Food Items button from the Food Instrument Detail dialog as defined in this document.
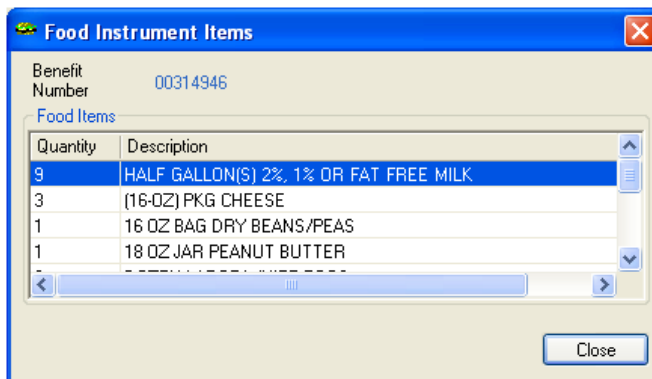

Figure 8 – Food Instrument Items Dialog

3.5.1 Controls

This section describes the behavior of the controls on the Food Instrument Items dialog.

3.5.1.1 Benefit Number Text and Value Label

The control allows the user to view the Benefit Number of the food instrument. The value label is populated with the value of the Serial-No column of the FOOD-INSTRUMENT table. The value displays in the inverse color of the form.

3.5.1.2 Food Items Data Grid

The control allows the user to view the food items printed on the food instrument. The data grid contains the following columns:

- Quantity
- Description

The grid will contain an entry for each food item that printed on the food instrument. The entries will be sorted in the order that the food items printed on the food instrument. The data in the grid is read-only.

3.5.1.3 Close Button

The control will allow the user to exit the Food Instrument Items dialog and return to the Food Instrument Detail dialog. It is enabled when the dialog is active. Characteristics for the Close button are defined in *Consistencies*.

3.5.2 Processes

Upon initial presentation of the dialog, the title bar text will be set to "Food Instrument Items"

The Benefit Number value label will display the currently selected Benefit Number

The Food Items data grid will contain an entry for each food item that printed on the food instrument.

3.5.2.1 Edits

There are no updateable controls on this dialog, therefore no edits are defined.

3.5.2.2 Saving the Data

There are no updateable controls on this dialog, therefore no data is saved.